

COVID-19 Vaccine Management System (CVMS) - Provider Portal

Offer Your Extra Vaccines Through Vaccine Marketplace Job Aid

If you have a surplus of COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** in the CVMS Provider Portal to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

Please follow the instructions below to learn:

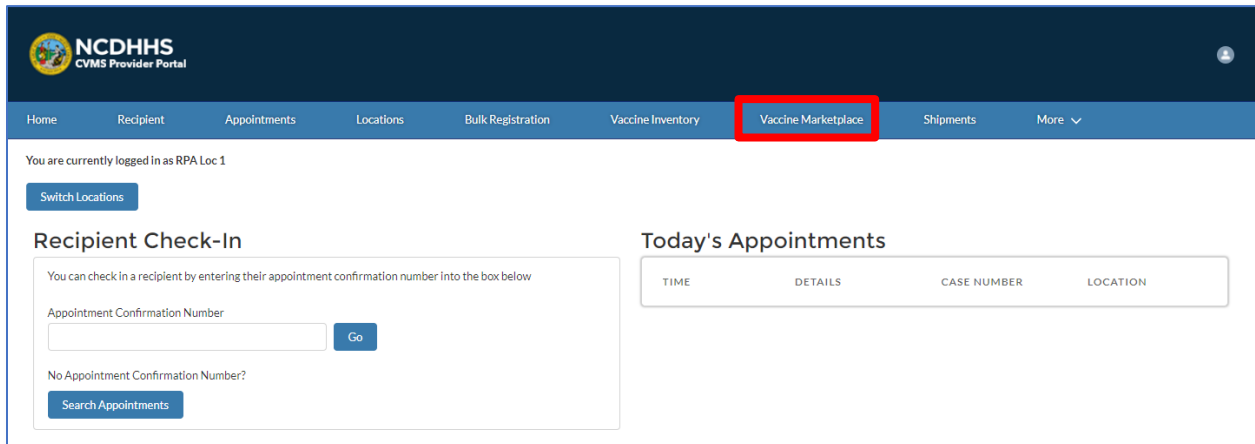
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Only users with a HEALTHCARE LOCATION MANAGER profile can request doses from other healthcare providers.

1 How to Offer Extra Vaccines to Other Providers

If you have a surplus of COVID-19 vaccine doses, first check if other providers in your area are looking for COVID-19 vaccine doses. If you don't find any, you can post a request on your own.

1. Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal



The screenshot shows the NCDHHS CVMS Provider Portal interface. The navigation bar at the top includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, **Vaccine Marketplace** (highlighted with a red box), Shipments, and More. Below the navigation bar, the user is logged in as RPA Loc 1. The main content area is divided into two sections: 'Recipient Check-In' on the left and 'Today's Appointments' on the right. The 'Recipient Check-In' section contains a form for entering an appointment confirmation number and a 'Go' button. The 'Today's Appointments' section contains a table with columns for TIME, DETAILS, CASE NUMBER, and LOCATION.



2. Change the view to **Seek Transfer Match – Wanted (Active)**

The screenshot shows the NCDHHS CVMS Provider Portal. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and More. Below the navigation bar, there is a section titled 'You can utilize Vaccine Marketplace to facilitate transfers...' followed by instructions on how to use the 'Seek Transfer Match' feature. A 'New Seek Transfer Match' button is visible in the top right corner. The main content area shows the 'Orders' section with a dropdown menu open, displaying the following options: 'Seek Transfer Match - All', 'Seek Transfer Match - All (Active)', 'Seek Transfer Match - Extra (Active)', and 'Seek Transfer Match - Wanted (Active)'. The 'Seek Transfer Match - Wanted (Active)' option is highlighted with a red box.

3. Click on **CITY** or **COUNTY** to sort the records in the ascending or descending order by location, and easily spot providers located nearby

The screenshot shows the NCDHHS CVMS Provider Portal with the 'Seek Transfer Match - Wanted (Active)' view selected. The table displays 2 items, sorted by County. The table columns are: Order Number, Account Name, County, City, Manufacturer, Br..., D..., Created Date, and Last Modified Date. The first two rows of data are visible:

	Order Number	Account Name	County	City	Manufacturer	Br...	D...	Created Date	Last Modified Date
1	ORD-0017244	DoNotUse - NotRe...	Stokes	Big City	Pfizer-BioNte...		50	6/2/2021, 4:46 A...	6/2/2021, 4:46
2	ORD-0017341	Training Team Vacci...	Wake	Raleigh	Moderna		100	6/9/2021, 8:54 PM	6/9/2021, 8:54



4. Select the Request that Match Your Needs by clicking on the **ORDER NUMBER**

Orders									
Seek Transfer Match - Wanted (Active)									
2 Items • Sorted by County • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago									
	<input type="checkbox"/>	Order Number	Account Name	County	City	Manufacturer	Brand	D...	Creat
1	<input type="checkbox"/>	ORD-0017244	DoNotUse - NotRe...	Stokes	Big City	Pfizer-BioNte...		50	6/2/21
2	<input type="checkbox"/>	ORD-0017341	Training Team Vacci...	Wake	Raleigh	Moderna		100	6/9/21

5. Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Order

ORD-0017342

Edit

Clone

Account Name

Training Team Vaccine Provider - Site 1

Status

Active

Manufacturer

Doses (Number)

300

Order Start Date

6/9/2021

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.

2. Monitor the Vaccine Marketplace to identify a 'match' for your need.

3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.

4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>

5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type

Extra (to Send Outbound)

Order Start Date

6/9/2021

Account Name

Training Team Vaccine Provider - Site 1

Status

Active

Doses (Number)

300

Status Indicator

County

Wake

HCP Contact Name

Ernest Celestine

City

Raleigh

HCP Contact Phone

222-333-4444

Additional Comments (Optional)

HCP Contact Email

ernest.celestine@test.test

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

Lot 1234567 - exp 1/1/2022

Lot Transferred

1234567

Vaccine Product to Transfer

Pfizer-BioNTech (5 doses/vial) (195 MDV) COVID-19 Vaccine

Doses Per Vial (Number)

6

Expiration Date

1/1/2022

Sending Location Parent Account (Org)

Training Team Vaccine Provider

Additional Details if Wanted (To Receive Inbound)

Manufacturer

Brand

Read the general instructions

Read the details provided by the other provider

Contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**

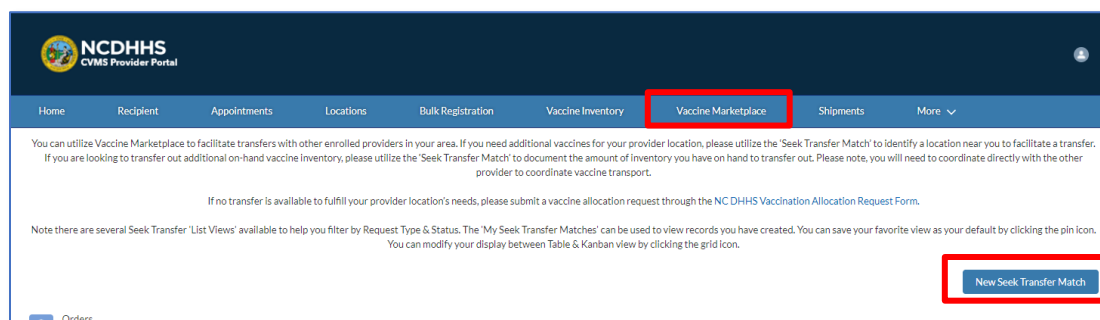
6. If you both agree on the conditions of transfer, you can **initiate an Outbound Transfer** (see the second section of this document for detailed instructions).

OR

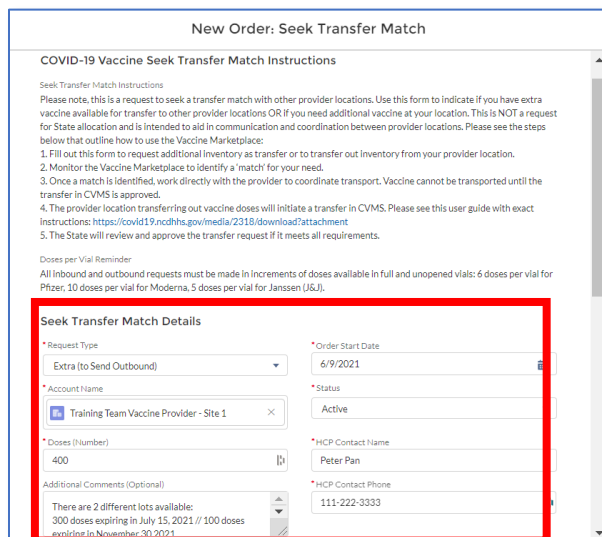
6. If no provider is looking for the type of COVID-19 vaccine product you are offering, post an extra dose availability offer in the Vaccine Marketplace to let other providers know that you can support them.

2 How to Post an Offer for your Extra Vaccines in the Vaccine Marketplace

1. Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal
2. Click on **NEW SEEK TRANSFER MATCH**



3. Complete the New Order: Seek Transfer Match form with the following details:



The screenshot shows the 'New Order: Seek Transfer Match' form. A red box highlights the 'Seek Transfer Match Details' section, which includes the following fields:

- Request Type:** Extra (to Send Outbound)
- Account Name:** Training Team Vaccine Provider - Site 1
- Doses (Number):** 400
- Order Start Date:** 6/9/2021
- Status:** Active
- HCP Contact Name:** Peter Pan
- HCP Contact Phone:** 111-222-3333

Additional Comments (Optional): There are 2 different lots available: 300 doses expiring in July 15, 2021 // 100 doses expiring in November 30, 2021

- **Read the instructions** at the top of window
- **Request Type:** select “Extra (to Send Outbound)”
- **Order Start Date:** enter today’s date
- **Account Name:** select your location account name
- **Status:** select **ACTIVE**
- **Doses:** enter the number of doses you are looking for
- **HCP Contact Name/phone/email:** who to contact to agree on the transfer
- **Additional Comments:** be as detailed as possible. For example, “These Extra doses of 400 doses are split over six separate inventories. Here are the number of doses per lot and expiration date: xxx – xx/xxxx”



Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory
Lot 123456 Exp 5/1/2022

Additional Details if Wanted (To Receive Inbound)

Manufacturer
--None--

Requesting Provider to check box below to confirm adherence to each requirement:

Adherence to all Requirements
☒

Requirement 1 (Seek Transfer Match)
Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport:
<https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)
All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

System Information

Order Record Type: Seek Transfer Match
Order Owner: Simon Couderc

Cancel Save & New **Save**

- **Associated Vaccine Inventory:** select the lot number you are offering. See previous slide if you wish to submit multiple inventories of the same brand
- **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

- Click **SAVE**

4. If a local provider contacts you and you are in agreement with the conditions of transfer, you can **initiate an Outbound Transfer**.

3 How to Transfer your Inventory

1. Navigate to the **VACCINE INVENTORY** tab in the CVMS Provider Portal and select the Vaccine Inventory record from which the doses you have agreed to ship will come

NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration **Vaccine Inventory** More

Scan or type a barcode Add Waste Insufficient Quantity Inbound Transfer Outbound Transfer

Vaccine Inventories
All Vaccine Inventories

17 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

	Vaccine In...	Account N...	Product Name	Usage (First ...	To...	D...	D...	Ex...	D...	Lot	Status	Expiration D...	Date Received	Created Date
1	Delivery 03/05/...	Clinic Location1	Janssen COVID...	First Dose only (...)	100	98	2		0	4441241	Available	3/5/2023, 12:00...	3/5/2021, 10:53...	3/5/2021, 10:53...
2	Dose 2 Inventor	Clinic Location1	Pfizer-BioNTec...	Second Dose onl...	50	-48	3	30	125	123	Available	3/1/2023, 12:00...	3/2/2021, 9:59...	3/2/2021, 10:01...
3	JJSingleDose	Clinic Location1	Janssen COVID...	First Dose only (...)	300	293	7		0	Lot3321JJ	Available	3/3/2022, 12:00...		3/4/2021, 2:06...
4	Lot 1234325	Clinic Location1	Pfizer-BioNTec...	First Dose only (...)	1,000	976	24		0	1234325	Available	2/1/2022, 12:00...	2/21/2021, 12:0...	2/25/2021, 10:0...
5	Lot 222 Delivery...	Clinic Location1	Moderna (10 M...	First Dose only (...)	1,000	995	5		0	Lot 222	Available	9/30/2021, 12:0...	3/8/2021, 12:00...	3/9/2021, 11:36...



2. Click on the **RELATED** tab then click **NEW** to create a new **ORDER**

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Bulk Registration, Reports, Vaccine Inventory, and More. The main content area displays the 'Vaccine Inventory' for 'Grace Pfizer Inventory'. A table shows inventory details: Account (Clinic ABC Loc 1), Total Doses (100), Extra Doses (100), Doses Available (133), Doses Administered (49), and Doses Wasted (5). Below the table, the 'DETAILS' section is active, and the 'RELATED' tab is selected. Under the 'Orders (0)' section, the 'New' button is highlighted.

3. Select **TRANSFER OR REDISTRIBUTION**, then click **NEXT**

The screenshot shows the 'New Order' form. It has a title bar 'New Order' and a section 'Select a record type' with two radio buttons: 'Transfer or Redistribution' (selected) and 'Seek Transfer Match'. At the bottom right, there are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted.



4. Complete the **TRANSFER OR REDISTRIBUTION** form

New Order: Transfer or Redistribution

COVID-19 Vaccine Redistribution/Transfer Request Form

Redistribution/Transfer Instructions
To request redistribution or transfer of COVID-19 vaccine inventory from a location with an approved redistribution agreement (not required for a transfer) on file to a location within their organization (Redistribution) or outside their organization (Transfer), the Sending Provider shall complete and submit this form. Redistribution and transfer requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. All COVID-19 vaccine providers must comply with the CDC requirements for vaccine management, including storage and handling, and temperature monitoring at all times. Providers must keep all records related to COVID-19 vaccine management for a minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you have any questions.

Transfer Information

* Account Name:

* Status:

Vaccine Receiver:

Unable to find Vaccine Receiver: ☐

* Dose Transferred:

* Vials Transferred:

* Reason for Request:

* Order Start Date:

Associated Vaccine Inventory
Lot 123456 Exp 5/1/2022

Receiving COVID-19 Enrolled Provider Information

Receiving Location Name (CVMS):

Receiving Location Street Address:

Receiving Location City:

Receiving Location Phone:

Receiving Location Zip:

Receiving Location Primary Vaccine Coord:

Receiving Location Primary Coord Email:

Sending Provider to check box below to confirm adherence to each requirement:

☐ Adherence to all Requirements

Requirement 1:
Sending Provider and Receiving Provider location names listed above match exactly how they appear in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal

Requirement 2:
Sending Provider has a completed CDC COVID-19 Vaccine Redistribution Agreement (not needed for Transfers) in the CVMS Provider Enrollment Portal and the Receiving Provider has a fully completed and submitted CDC COVID-19 Vaccine Program Provider Agreement and Profile in the CVMS Provider Enrollment Portal

Requirement 3:
Sending Provider has confirmed with Receiving Provider that they have the appropriate capability and capacity to store the COVID-19 vaccines

Requirement 4:
Sending Provider is not requesting redistribution or transfer of open or partial vials

Requirement 5:
Sending Provider is also shipping associated ancillary kit

Requirement 6:
Only COVID-19 vaccines are listed on this request

Approval

Approver's Comments:

Sending Location Details

Sending Location Date and Time:

Sending Location Comments:

Cancel Save & New Save

Read the general instructions

Complete Transfer Information:

- **Account name:** select your location name
- **Vaccine Receiver:** select the location name receiving the transfer (use search if necessary)
- **Dose Transferred:** enter the quantity
- **Reason for request:** refer to the marketplace

If the receiving location is not part of your organization, also complete that section:

- **Receiving Account name:** enter again the location name receiving the transfer
- **Location Street, city, zip code:** enter receiving location address information
- **Receiving Location Primary Vaccine Coordinator:** enter contact name phone and email address

Read and Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox

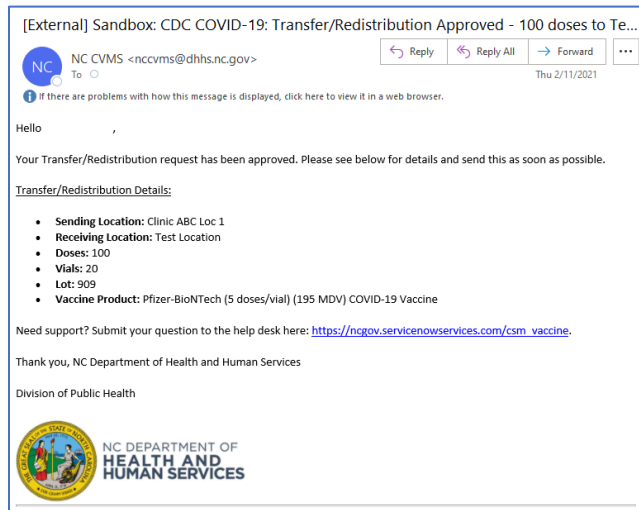
Complete the shipment details later, only when the shipment transport has been approved and arranged (see step 9)

5. Review your form and click **SAVE**

6. NCDHHS will rapidly review the application and approve the transfer



- You will receive an email notification indicating that the transfer request order has been approved



- Prepare the transport of the transferred vials

Note: You can check the **NCDHHS guidance for transport of COVID-19 vaccine** at <https://covid19.ncdhhs.gov/media/3070/download?attachment>.

- Navigate back to the **TRANSFER OR REDISTRIBUTION** record on the **RELATED** tab of the **VACCINE INVENTORY** record

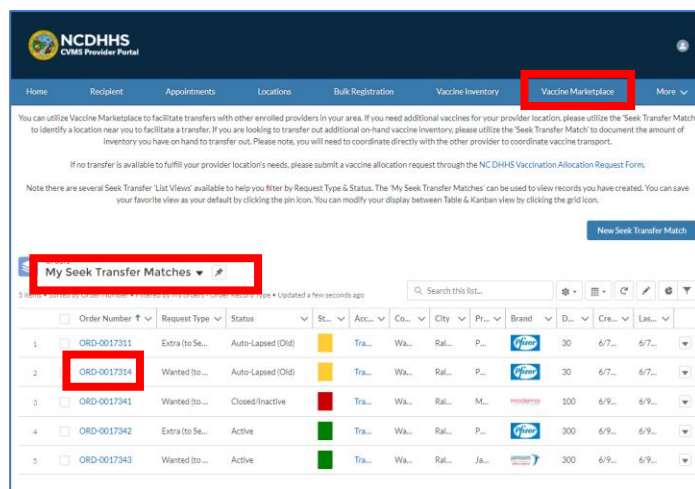
- Enter the **date and time** of the shipment
- Sending Location Comments:** indicate transport details

- Click **SAVE**



4 How to Maintain your Offer Posted in the Vaccine Marketplace

After 7 days, your post in the Vaccine Marketplace will expire. You can extend or close your post prior to the seven days. After seven days, you can clone your form and post a new one with the same information.

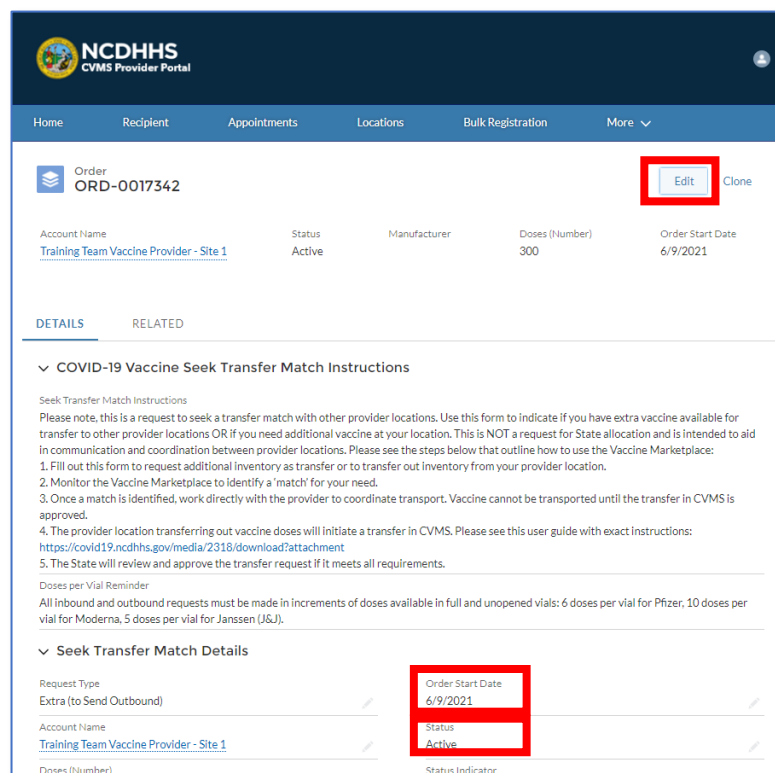


1. Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal

2. Change the view to **MY SEEK TRANSFER MATCHES**

3. Open the request you wish to extend, close, or clone

4.1 Extend or Close your Post (if not expired)



4. Click on **EDIT** at the top right corner of the screen

5. To Extend the request: update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down

6. To Close the request: update the **STATUS** to Close/Inactive

7. Click **SAVE**



4.2 Clone your Post (if expired or closed)

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top right, there is a 'Clone' button highlighted with a red box. Below the header, the 'Order' section displays 'ORD-007314' and 'Training Team Vaccine Provider - Site 2'. The 'Status' is 'Auto-Lapsed (Old)' and 'Doses (Number)' is '30'. The 'DETAILS' section is expanded, showing 'COVID-19 Vaccine Seek Transfer Match Instructions'. Under 'Seek Transfer Match Details', the 'Order Start Date' is '6/7/2021' and the 'Status Indicator' is 'Auto-Lapsed (Old)', both highlighted with red boxes. Other fields include 'Request Type' (Wanted to Receive Inbound), 'Account Name' (Training Team Vaccine Provider - Site 2), 'Doses (Number)' (30), 'County' (Wake), 'City' (Raleigh), and 'HCP Contact Phone' (222-333-4444).

4. Click on **CLONE** at the top right corner of the screen

5. Update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down

6. Update the Status to **ACTIVE**

7. Update any other fields if necessary

8. Click **SAVE**

If you have any questions or issues, please go to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine and select the "Vaccine Provider" option to submit your question or issue.

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 a.m. – 7 p.m. ET

Saturday & Sunday: 10 a.m. – 6 p.m. ET

Version 2 – June 22, 2021